

Message Text

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PAGE 01 OTTAWA 02694 141350Z

44

ACTION AGR-20

INFO OCT-01 EUR-25 ISO-00 EB-11 COME-00 STR-08 TRSE-00

DRC-01 RSC-01 /067 W

----- 122540

R 132242Z NOV 73

FM AMEMBASSY OTTAWA

TO SECSTATE WASHDC 2083

UNCLAS OTTAWA 2694

E.O. 11652: N/A

TAGS: EAGR CA

SUBJECT: QUARTERLY MEAT CABLE

PASS AGRICULTURE

REF: A) CODE NO. 13C; (B) OTTAWA 2634; (C) OTTAWA 1109.

QUARTER	1972	1973	1974
1ST	4.5	11.1	
2ND	7.7	3.7	
3RD	0.9		
4TH	12.1		

A) NO CHANGE REFTTEL (C).

2. SUPPLY AND DISPOSITION: PORK AND POULTRY (THOUSAND POUNDS)

(A) PORK	POST EST.		P. FORECAST
	1972	1973	1974
STOCKS, JAN. 1	28,969	18,985	25,000
PRODUCTION	1,392,607	1,330,000	1,370,000
IMPORTS	45,218	70,000	65,000
TOTAL SUPPLY	1,466,794	1,418,985	1,455,000
EXPORTS	115,517	120,000	125,000
DOMESTIC DISAPPEARANCE	1,332,292	1,273,985	1,305,000
STOCKS, DEC. 31	18,985	25,000	25,000
PER CAPITA (1LBS.)	60.9	57.6	58.3

UNCLASSIFIED

UNCLASSIFIED

PAGE 02 OTTAWA 02694 141350Z

KB) POULTRY

STOCKS, JAN. 1	55,622	54,719	55,000
PRODUCTION	981,083	1,025,000	1,050,000
IMPORTS	13,995	10,000	10,000
TOTAL SUPPLY	1,050,700	1,089,719	1,115,000
EXPORTS	3,165	5,000	5,000
DOMESTIC DISAPPEARANCE	992,816	1,029,719	1,050,000
STOCKS, DEC 31	54,719	55,000	60,000
PER CAPITA (1LBS)	45.5	46.5	47.0

3. BEEF PRODUCTION

(A) ESTIMATE OF CATTLE NUMBERS ON FARMS (THOUSANDS)

	POST ESTIMATE		POST FORECAST
	1972	1973	1974
JUNE 1	13,657	14,052	14,200
DEC 1	12,726	13,100	13,200

(B) SLAUGHTER

CATTLE & CALVES	4,037	3,800	4,000
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(C) SUPPLY (THOUSAND POUNDS CARCASS WEIGHT EQUIVALENT)

	POST ESTIMATE		POST FORECAST
	1972	1973	1974
STOCKS, JAN. 1	38,733	50,036	35,000
PRODUCTION- TOTAL	1,978,853	1,920,000	1,950,000
-BEEF	1,898,328	1,860,000	1,900,000
-VEAL	80,525	60,000	50,000
IMPORTS -TOTAL	213,522	215,000	190,000
-BONE-IN	27,431	40,000	25,000
-BONELESS-FRESH	15,375	20,000	15,000
-FROZEN	129,525	125,000	120,000
-OTHER	41,191	30,000	30,000
TOTAL SUPPLY	2,231,108	2,185,036	2,175,000
EXPORTS -TOTAL	91,969	91,500	80,000
-BEEF-BONE IN	6,772	15,000	5,000
-BONELESS	66,320	65,000	65,000

UNCLASSIFIED

UNCLASSIFIED

PAGE 03 OTTAWA 02694 141350Z

-CURED	8,340	7,500	7,000
VEAL	5,802	2,000	1,000
N.E.S.	4,732	2,000	2,000
DOMESTIC DISAPPEARANCE	2,089,103	2,058,536	2,055,000
STOCKS, DEC. 31	50,036	35,000	40,000
PER CAPITA (1LBS)	95.6	93.00	92.0

4. PRICE FORECAST

(A) WHOLESALE DRESSED MEAT PRICES -TORONTO

	1972	1973	1974
JANUARY	66.0	71.4	
*EBRUARY	65.6	73.0	
MARCH	65.9	74.7	
APRIL	65.6	76.2	
MAY	65.8	77.9	
JUNE	66.0	80.1	
JULY	65.7	81.1	
AUGUST	64.0	97.5	
SEPTEMBER	62.6	87.0	
OCTOER	61.3	84.6	
NOVEMBER	64.2	88.0	
DECEMBER	66.9	92.0	
AVERAGE	65.0	82.0	85.0

(B) IMPORTED BONELESS BEEF PRICES
AVAILABLE FROM L&MP/FAS/W

5. QUARTERLY ESTIMATE OF MEAT PARTS
TO THE UNITED STATES
(1,000 LBS. PRODUCT WEIGHT).

BEEF EXPORTS TO UNITED STATES

QUARTER	1972	1973	1974
1ST	11,892	10,533	12,000
2ND	18,495	12,862	18,000
3RD	15,297	24,105	15,000
4TH	13,049	7,500	10,000
	50,685	55,000	55,000

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PAGE 04 OTTAWA 02694 141350Z

GOC ACTIONS AFFECTING 1973 BEEF TRADE

- 1) TARIFFS OF 1.5 CDN. CENTS/1B. ON LIVE CATTLE AND 3.0 CDN. CENTS PER POUND ON DRESSED BEEF REMOVED FEBRUARY 20/73.
- 2) EXPORT LICENSING REQUIREMENT PLACED ON BEEF AND PORK AUGUST 13.
- 3) EXPORT LICENCING REQUIREMENT REMOVED SEPTEMBER 15.
- 4) TARIFFS (1) PUT BACK ON CATTLE AND BEEF, SEPTEMBER 21/73.
- 5) SURTAX OF 3.0 CDN. CENTS PER POUND ON LIVE CATTLE AND 6.0 CDN. CENTS PER POUND ON FRESH DRESSED MEAT EFFECTIVE NOVEMBER 2/73 FOR 30 DAY PERIOD. FROZEN MEAT EXEMPTED FROM THIS SURTAX.

COMMENT: AT PRESENT THERE IS LITTLE ACTIVE TRADING OF
IMPORTED BONELESS BEEF DUE TO STRONG DOMESTIC SUPPLIES.

UNFILLED INTEREST REMAINS FOR FEBRUARY DELIVERIES AT HIGHER PRICE LEVELS THAN PRESENT. CANADIAN THIRD QUARTER EXPORTS TO U.S. HIGHER THAN EXPECTED DUE TO HEAVIER TTHAN NORMAL SHIPMENTS OF HIGH QUALITY BEEF CARCASSES LARGELY RESULTING FROM U.S. PRICE FREEZE. THIS POST FORESEES HZEVIER COW SLAUGHTER IN 1974 AS OLDER ANIMALS ARE CULLED FROM HERDS BUILT UP IN PAST TWO YEARS. THIS SHOULD PROVIDE FOR EXPORTS OF BONELESS BEEF ABOUT EQUAL TO 1973 TOTAL. CANADIAN BEEF EXPECTED TO REMAIN CLOSE TO PRESENT LEVELS DUE TO DOMESTIC FEED GRAIN POLICY.
SCHMIDT

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